Social Services Transformation:
Streamlining Assistance Programs at Scale

At the beginning of the pandemic, many government organizations rapidly transformed their operations to assist individuals and families in need. While these efforts addressed immediate needs, they also demonstrated how a phased approach will be critical to long-term transformation that goes beyond the rapidly developed point solutions that characterized some COVID-19 relief programs.

"The government had immediate, urgent problems that had to be addressed during the pandemic," says Peter Still, Oracle senior principal product strategy manager. "But the government also has a modernization agenda, and I don't think that agenda has inherently changed."

This paper outlines how social services agencies can take a modular approach to modernization to automate key business processes underpinning assistance programs — from personalized advice, the application process, and eligibility verification through payment — to drive lasting transformation.

Lessons Learned, Ongoing Needs

Social services agencies faced two critical needs as the pandemic spiked in early 2020. The closure of government offices sent employees to work from home, at times without access to the systems or telephony needed to ensure continuity of services. At the same time, there was an unprecedented surge in constituents needing government services, with call center volumes increasing tenfold or more in some cases. "The massive spikes in demand flattened already impaired systems," Still says. "A convergence of these two factors meant the government just wasn't able to function normally, and manual services broke down."

Social services agencies and their technology partners rapidly stood up solutions, scaling cloud-based contact centers and creating one-off fixes to address gaps in business processes — for example, quickly publishing online forms to apply for benefits after in-person offices closed. That in and of itself represented a sea change for many social services agencies, which tend to be risk-adverse in terms of technology adoption, according to Still. The volume of traffic to these solutions also confirmed that constituents' willingness and ability to access online solutions, while not universal, was much higher than anticipated, particularly among low-income populations.

However, these new solutions brought with them additional challenges. "Because it was an emergency situation, some point solutions cut a lot of corners, and governments can learn from this," Still says.

Many weren't fully integrated with existing systems. For example, an online application form stood up by one agency generated PDF documents "that piled up in a queue

waiting for manual data entry," Still says. "They hadn't integrated the new application process into their eligibility flow, which contributed to further downstream delays."

Fraud and errors — often intentional, some the result of uncertainty about program rules and eligibility — also proved a significant challenge. This was particularly pronounced in unemployment systems, where several states reported double-digit percentage rates of fraud.[1] But a wide range of social services programs also experienced fraud, which highlighted the importance of building rigorous eligibility checks and verification steps into social services systems.

Moving beyond the pandemic, many social services agencies are recognizing the need to reconfigure solutions to support longer-term goals. Governments "need to automate and digitize government service, advice to constituents, and other processes," Still says. "These organizations needed urgent assistance to meet an immediate demand. Now, it has to be delivered in a way that will support an end-to-end business process and organizations' medium- to long-term goals."

A Modular Approach to Modernization

As they seek to address longer-term goals through modernization, social services agencies are recognizing the potential benefits of broader shifts in technology implementation.

"We did see a new sense of urgency driven by the pandemic to not only start implementing new approaches, but also to get away from the monolithic projects that take many years and millions of dollars to implement," Still says.

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As in other areas of government, social services agencies are now evaluating a phased approach to technology modernization. Such an approach, Still says, is characterized by "starting small, having off-ramps in case requirements change, and doing something with immediate impact that serves as a stepping stone toward overall modernization instead of Band-Aids to single issues."

This modular approach can help address some of the greatest barriers to expanding access to social services and benefits in equitable ways. Too often, programs remain reliant on manual processes — such as requiring individuals to apply for benefits in person or complete multiple applications for similar or complementary programs. The friction in these processes is exacerbated when language barriers are involved.

"It's not just COVID emergency solutions that are under scrutiny here," Still says. "If we look at health and human services and other social programs, why are any of these programs so manual to apply for and interact with overall?

Governments often assume constituents know the programs and how governments are organized — but we shouldn't expect constituents to be experts on government."
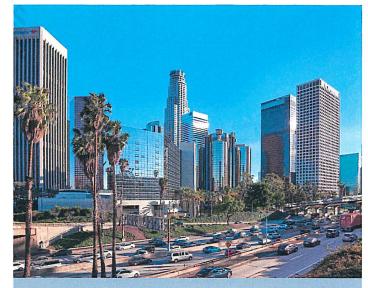
Modernization can help automate and simplify these processes for constituents. By taking a phased approach with modular components, social services agencies can also move away from complex multi-year projects by focusing on their greatest needs and building on their existing capabilities.

Many social services programs have similar business processes, each of which can be addressed by modular solutions. They include:

■ **Access.** Constituents can request advice on program eligibility and apply for benefits online with a mobile device or computer. These systems can offer "personalized and automated advice to constituents, providing tailored information and matching them to the programs that are best suited to their circumstances," Still says. Solutions can also provide applicants with proactive email notifications regarding application status.

■ **Prequalification.** Online applications can replace in-person interviews to determine whether constituents qualify for benefits under one or more programs. They also can let applicants know in real time whether they're eligible for aid, and for what amount.

■ **Document upload.** A secure digital interface can replace paper-based processes to digitally verify an applicant's driver's license or other documents.

■ **Case management.** Systems enabled with workflows can help caseworkers manage clients, approve claims, and request information or conduct interviews — whether in person or online — with ready access to supporting documents. Systems can also provide recommendations for related services, such as job training or energy assistance, and provide aggregated metrics to evaluate program efficacy.

■ **Payment capture.** Constituents can enter their preferred payment method — including physical or virtual debit cards which reduce the cost and time associated with processing checks — and the information needed to process it.

■ **Payment.** Virtual payment methods captured in the previous step or through existing records speed digital payment without in-person visits. A majority (51 percent) of constituents prefer instant disbursements for government payments.[2]

Together, these modular elements provide an end-to-end solution for social services programs. But they can also be implemented in stages to address agencies' most pressing needs.

"We can decompose any of these programs into different units that work together and can get much more rapid outcomes by taking a modular, phased approach," Still says. Doing so involves

Meeting Immediate Needs, Building Long-Term Solutions

The COVID-19 pandemic hit Los Angeles particularly hard. By mid-April 2020, only 45 percent of county residents still had jobs, with low-wage hourly workers who worked in homes and restaurants, seasonal workers, day laborers, street vendors, and self-employed individuals feeling the impact the soonest and facing the greatest needs.[3]

To expedite relief for those who needed it the most, the mayor's office launched the L.A. Emergency COVID-19 Crisis Fund as part of the city's response to the pandemic. More than 12,000 people donated to the fund, which ultimately raised more than $36 million that helped support more than 37,000 of Los Angeles' neediest families.[4] But from the onset, speed was the greatest priority.

"They needed a way to ensure they could quickly verify eligibility and circumstances and ensure funding got to those most in need as quickly as possible," Still says.

The Civic Assist solution integrated online self-service with case management, streamlining the process to verify applications and approve payments. Automated notifications helped keep applicants apprised of where their applications were in the process, and payments were provided through a partnership with Mastercard, which issued debit cards, known as "The Angeleno Card," pre-loaded with funds.

While Los Angeles' approach met an immediate need, the United Way of St. Louis is building an infrastructure for multiple programs and benefits. The organization serves more than three million St. Louis constituents through a coordinated network of benefits provided by more than 160 local nonprofits. To provide financial disbursements for a variety of services, including renters' assistance and COVID relief, it implemented an end-to-end solution that allows constituents to apply online. The solution then applies funding rules to determine eligibility and authorize payments.

recognizing that "each of these stages is part of the vision, but they can stand alone."

Agencies can begin modernization in this way with small projects. For example, an agency could quickly implement a modular intake solution that offers automated guidance to constituents and routes them to the appropriate benefits and programs — which would then be processed using existing workflows and systems. Such a solution "can cut out the delays and bottlenecks right at the start by providing an immediate and personalized experience," Still says.

But for longer-term transformation, agency leaders should identify desired outcomes and develop a roadmap to reach them. "If you break out the business outcomes, it's then very easy to target the technology to the outcomes, spend less on technology, and implement faster," Still says.

"This can help agencies think about their social solutions in a less monolithic way," Still says. "Every organization's journey will be different, but they don't have to commit to everything at once, and they can choose their starting point."

Conclusion

Technology modernization can improve accessibility to, and equity of, social services programs by ensuring more people apply for — and receive — the benefits to which they are entitled. At the same time, applying rigorous eligibility checks and leveraging the power of modern data analytics can help address fraud across multiple stages of the benefits process.

However, taking a phased approach to modernization will require social service agencies to rethink their tactics for transformation. "Historically, there's been a strong culture of custom building in human services," Still says. "But agencies are recognizing they don't have to reinvent the wheel every time."

That's because modular solutions are built around the common building blocks of social services programs — including case management. As a result, they can add different components to create end-to-end solutions over time. But the real potential, says Still, comes when agencies recognize the common links between different benefits and programs.

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"It's very common for a social services organization to have many different programs and systems which are connected but still siloed," Still says. "They don't have a good idea of who the constituent is or a 360-degree view because all the data is trapped in these silos."

A common data platform can provide the opportunity to add not just the different business processes involved with a particular program, but also to integrate multiple programs to ensure constituents receive the right services from across the social services spectrum. "It's important to have a platform broad enough to absorb as much of the business as you want to put into it," Still says.

Ultimately, the decision about what to integrate involves business priorities, according to Still. "It's very common for agencies to get caught up in technical detail at the expense of the business outcomes, but for all of these social programs, the outcomes are really important," he says. "IT projects can be very technocratic, but if you focus on human outcomes that governments strive to deliver, you can ensure government assistance goes to the right people as quickly as possible and help them return to self-sufficiency in the shortest timeframe."

This piece was written and produced by the Governing Content Studio, with information and input from Oracle.

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